

Contents

VOLUME 27 / NUMBER 1 ■ JANUARY / FEBRUARY 2008

Meeting Your Mission Through Member-Driven Fundraising

4

Rona Fernandez

Rona Fernandez profiles three organizations that rely on members not only to pay dues and engage actively as leaders, but also to participate in raising money for the cause.

The Donor in Us All: Reflections on Giving and Givers

8

Chris Malcomb

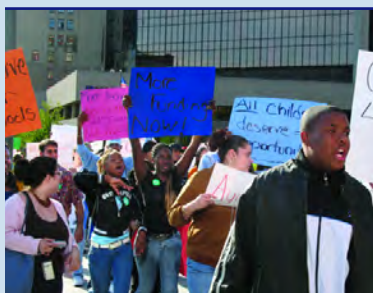
What motivates people to become donors? Chris Malcomb describes close encounters with generosity, illustrating how powerful a force it is.

11 Steps to a Great Donor Cultivation Event

11

Jean Van't Hul

Here's another way to create a personal connection with your donors. Jean Van't Hul shows how events can be used to bring donors closer to your organization — and bring you closer to your donors.



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LETTER FROM THE CO-DIRECTOR

PRISCILLA HUNG



Happy New Year! Another new year, another opportunity for setting goals for self-improvement. In our society, that usually means thinking along the lines of bigger, faster, more. I personally have several New Year's resolutions that speak to this mentality, such as running a faster half-marathon and saving enough money to go to my cousin's wedding in Bali. But as a fundraiser and activist, I also want to spend more time focusing on other, more important aspects in my life, particularly ones that relate to having enough, building, and sharing. I share my other resolutions for this year that reflect these desires in the hope that they may stimulate some of your own:

- **Be more generous.** I not only want to be a good fundraiser, I want to be a generous giver. This year, I want to give to groups when I'm moved to do so, reminding myself that I have enough. And I want to offer my time more generously as well, sharing a few minutes to see how someone is doing without worrying about the other demands on my time.

- **Build deeper relationships with our donors.** I admit I haven't put as much time into communication with all of you who are donors to GIFT and the *Grassroots Fundraising Journal* as I'd like. In 2008, you'll be hearing from me more!

- **Share the work.** I'm often worried about overworking our board and volunteers, but the more I understand that sharing the work also means sharing ownership and building leadership, the more I realize that it is a necessary part of building a broad-based movement.

If you, too, have such resolutions, the big question is how we are going to carry them out. I suggest the first step is to read the articles in this issue of the *Journal*! In a meditation on generosity, Chris Malcomb explores the true soul of giving; to help build stronger relationships with donors, Jean Van't Hul offers a framework for how to plan a donor cultivation event; and as an example of sharing the work, Rona Fernandez showcases three organizations that support members in taking the lead on fundraising.

And I want to give you a quick update about some temporary staff changes at the *Journal*: Stephanie Roth, Co-Director and Editor of the *Journal*, will be telecommuting from Montreal, where she and *Journal* founder Kim Klein are spending six months as Kim completes an appointment at Concordia University. Associate Publisher Jennifer Emiko Boyden will be scaling back her work in the first half of the year to spend time with newborn Elias. Both Stephanie and Jennifer will be back to their normal hours in the office in July. Please wish them both well, if you get a chance!

We hope that the articles in this issue of the *Journal* help you realize your own New Year's resolutions, whether personal or organizational. Here's to a great start!

Meeting *your* Mission

Through Member-Driven Fundraising

BY RONA FERNANDEZ

Membership programs are a popular way for nonprofits to raise funds from individuals who support their work. Many nonprofits have members — local museums, public television and radio stations, international organizations. For many of these groups, the term “members” is usually just another way of saying “donor”; membership is primarily a way to get more people to give to the organization by offering member benefits such as magazines, discounts on admission for events, and so on. But for people working in grassroots social justice groups, members are often the people at the heart of the work — not just clients or donors who receive services or benefits, but people who are active in making the change that the organization seeks, who help fulfill the organization’s mission of social change.

For groups for whom membership is more than just another label for donors, members can be a largely untapped source of fundraising income as well as an overlooked group of potentially effective fundraisers. Many of the members in these organizations are highly committed to program work, have direct experience with the organization, and can speak about why the work is important to the larger community.

If you work in a grassroots membership organization, how can you help these members raise more money for your work? And how much money can you expect to raise?

This article looks at three grassroots organizations that are doing the challenging but rewarding work of recruiting members to carry out their fundraising work. Each of these groups, to varying degrees, sees fundraising

as part of their members’ responsibilities, and each has built a strong base of members who contribute significantly to their fundraising capacity.

A MEMBER BY ANY OTHER NAME...

Each of the three groups profiled in this article has a different definition of a “member,” reflecting the diverse ways that organizations define stakeholders in their work.

Mujeres Unidas y Activas (MUA) is a group of low-income Latina immigrant women in the San Francisco Bay Area dedicated to personal transformation and community power. MUA runs several innovative programs to empower and educate its members,

including workshops and campaigns on the topics of immigrant rights, domestic violence, and women’s health. MUA defines a member as a woman who has actively participated in its programs for a specific period of time. Such participation can include attending ongoing MUA meetings or going to protests.

“After six months the women are eligible to participate in trainings that the organization gives,” says Andrea Lee, MUA’s Co-Director of Administration and Development. “They also have to pay membership dues.” MUA currently has 400 members in Oakland and San Francisco; about half attend MUA events on a weekly basis.

“It’s really clear to the members that they own the organization,” adds Lee. “Donors don’t direct where the organization is going, the members do.”

For Project South — a leadership development organization with offices in Atlanta and Washington, D.C. that engages in what they call “bottom-up movement-building for social and economic justice”— members are all the people who give money to the organization. But Project

We collect names constantly, particularly at our own campaign events. So all our prospects are hot to medium. We have no cold prospects.

South makes an important distinction between regular members and what it calls “constituent members.” Constituent members are people who are in the group’s target community of low- to middle-income Southerners.

Nearly half of Project South’s 750 members are from its core constituency. Although this model allows the group to stay true to its social justice mission and ensure that marginalized people will remain the leaders of the organization, Project South places importance on keeping nonconstituent members connected and invested in the program work. Doing so can be challenging. Many of Project South’s nonconstituent members live outside the South; they become members out of a sense of solidarity with low-income Southerners. Will Cordery, the group’s Development Director and Executive Leadership Team member, says the group tries to help the donor members feel more connected to the work by holding large public events where donor members can interact with constituent members.

“We have public spaces for members to engage with us annually,” he explained. “We invite all of our members to local community events that we put on every year, like our Juneteenth celebration, and we’ll have our big 25th anniversary shindig next year.”

The third of these groups is Metro Justice, an organizing group that has been working for a fair and just society in Rochester, New York since 1964. The group stresses educational work and does some direct service work through their many task forces, from fighting for gay marriage to working to win equitable funding in public schools. With only two paid staff, the group is almost entirely run by its dues-paying members and other volunteer supporters.

GETTING PEOPLE IN THE DOOR

If you are just starting or wanting to boost your existing membership program, how can you get more people in the door? Each of the three groups has different strategies to recruit members, but each of their strategies emphasizes starting with the people who come into regular contact with the organization and who naturally align themselves with the organization’s values and program goals.

“Our major strategy [for recruiting members] is through direct mail,” says Tanya Smolinsky, Organizing and Development Director at Metro Justice. “We collect names constantly, particularly at our own campaign events. So all our prospects are hot to medium. We have no ‘cold’ prospects.”

Metro Justice’s vigorous direct mail program to recruit new dues-paying members consists of mailings and phone calls to prospects. Every prospect is sent at least

four appeal letters and receives a follow-up phone call from a current member-donor before they are dropped from the group’s list.

Another strategy that Metro Justice has used successfully is reaching out to community members who write letters to the editors of local newspapers that reflect the social justice values of the organization. “First we call the person to thank them for writing the letter,” explains

Paying dues is an important way for members to feel ownership of the organization and to show their commitment by putting their money where their mouth is.

Smolinsky, “[then] we let them know that they might be interested in the work of our organization and we send a personal letter that basically says the same thing and includes a return envelope.”

Project South’s approach to recruiting members is to appeal to as many people as possible who come into contact with the group. “We have several community events throughout the year and meetings in our [office] building of organizers and community activists, or staff of other organizations,” states Cordery. “Once we make initial contact, these people become part of the contact database.” These prospects will then receive a fall appeal letter as part of Project South’s annual membership drive. “We also do a large e-mail as follow-up, and then phonebanking,” Cordery continued. The group’s staff, board, and current and constituent members put time into this phone follow-up.

For MUA, their current members are the main recruiting force for the organization. “The majority of new members come to MUA via existing members who do informal recruitment in their personal circles, at their churches — even on the bus,” says Lee. The group also has an Outreach Coordinator, Silvia Lopez, who helps mobilize graduates of MUA’s Leadership Training to do outreach for the organization on the street and at community events. MUA also contacts local social service providers up to twice a year to provide their clients with information about the group.

“In addition, MUA has maintained a strong presence in the Spanish-language media — television, radio, and print,” says Lee, and has relationships with a network of social workers, therapists, and other health providers who refer women to MUA.

THE IMPORTANCE OF PAYING DUES

Although their definitions of membership vary slightly, all three groups agree that members should pay dues. Paying dues is an important way for members to feel

ownership of the organization and to show their commitment by putting their money where their mouth is.

“There are many people who are active in the organization as volunteers but they have never paid membership dues,” says Metro Justice’s Smolinsky. “[But] a member is somebody who pays dues.” The group’s standard membership dues are \$30, but supporters can pay whatever is possible for them and still be considered Metro Justice members. Even with this flexibility, their average gift is \$70.

Clearly, having members carry out the fundraising work of the organization is not just a token gesture but is a mainstay of the group’s fund development program.

“We do renewals fairly frequently,” says Smolinsky. “I have very active volunteers. Our membership chair probably puts in 15 to 20 hours a week.” Volunteers are the lifeblood of Metro Justice’s fundraising work, maintaining the group’s database as well as doing follow-up phone calls to current and prospective members after mailings are sent out.

But consistently collecting dues can prove labor-intensive, especially since each group has a small number of staff relative to the number of their members.

“It’s very staff-intensive to take the dues and process them,” reports Lee of MUA. Rather than rely solely on staff, the group’s membership dues coordinator is a volunteer who is a member herself, which helps make dues collection more of a member responsibility than a staff task and helps increase the group’s ability to collect dues.

FUNDRAISING AS A MEMBERSHIP DUTY

Despite the importance of members feeling ownership by paying dues, given the small dollar amounts that grassroots groups often charge for dues, can a membership program translate into a significant source of revenue?

For the groups profiled here, the real fundraising potential of a membership program comes not from dues but from the fact that their members are expected to fundraise, just as they would gather petition signatures or attend a city council meeting as part of a campaign.

Project South has recognized that running an organization that spans the entire Southern region of the U.S. takes more work than even their five full-time staff can accomplish. Getting members to help with the fundraising work is a necessary strategy to secure resources for the organization.

“The staff operate at top capacity at all times,” says Cordery, “and there’s always lots of work. If there are members who’ve expressed interest in doing more, we

certainly plug them in.” Approximately 27 percent of Project South’s \$400,000 organizational budget comes from individual gifts, with another 38 percent coming from sales of publications and other mission-related products created by the group. This income is largely generated through the work of member-fundraisers.

Project South members are involved in the group’s fundraising committee and in major donor work, helping staff carry out the labor-intensive work of cultivating relationships with donors and asking for new and renewal gifts. Donor-members sell the group’s mission-related products, including publications and training materials, conduct trainings for Project South themselves, ask their friends and colleagues for donations, help organize community events and fundraisers, and do phonebanking to recruit new members.

Project South’s constituent members are not as involved in fundraising, although they do some phonebanking to member prospects and they attend community events.

Metro Justice raises about 84 percent of its \$140,000 annual budget from individuals, including income from membership dues and special events. Clearly, having members carry out the fundraising work of the organization is not just a token gesture but is a mainstay of the group’s fund development program.

Training for grassroots members in fundraising is key to the success of any program. Metro Justice, which has the strongest member-driven fundraising program of these three groups, makes fundraising training and support for its members an integral part of its fundraising work.

“I provide formal training to our task force members and guidance to members who are trying to raise funds for various campaigns,” states Smolinsky. “I am always trying to think of ways to get board members to be more knowledgeable about and more involved in fundraising. For example, I present our membership development strategies to the Fundraising Committee and then to the full board.”

According to Smolinsky, Metro Justice has very active committees of members who organize two major fundraising events for the group each year. Volunteers are also heavily involved in membership recruitment and development, from collecting names at events to helping with mailing parties and conducting phone banking. Metro Justice also has a Fundraising Committee, which includes board members as well as regular members.

At MUA, members are actively involved in fundraising, including as board members. Currently, eight of MUA’s eleven board members are grassroots leaders in the organization.

“I make an annual donation, I pay my membership dues, and I encourage other members to pay their dues as well,” says Maria Reyes, a MUA board member and grassroots leader who has been involved with MUA for ten years. Reyes also owns a jewelry business and often donates raffle prizes to the organization. “I also go to house parties organized by MUA donors and talk about MUA’s work and how important their support is to our organization’s survival.

“MUA has made it possible for me to be involved in this work by offering fundraising trainings and helping me to overcome my fear of being told no,” states Reyes. Board members receive formal training in grassroots fundraising, and Lee is considering how to involve regular members. “MUA is in the process of figuring out how to incorporate fundraising into existing programs,” explains Lee, “or whether to create a separate fundraising training/committee track for members interested in developing those skills.”

One fear for organizations whose members are low-income is that members will feel intimidated by fundraising tasks that involve talking to wealthy people. MUA has tried a unique approach to dealing with this potential challenge. The group recently facilitated a meeting between a major donor and four MUA members so that the donor could hear first-hand about the women’s experiences and the women could meet with a donor in a nonthreatening situation.

“It was a really great interaction because it was a dialogue,” reports Lee. “Our members asked her, ‘There are a lot of different ethnic groups, is there a reason why you’re supporting Latinas?’ They learned that this donor had been a teacher of English as a Second Language; she expressed how much she enjoyed working with and had gotten close to her students, who were mostly Latino.

We really want [the donor] to know what we’re about and our members are extremely open about their experiences.

“There’s an ability to cross certain language and cultural barriers when you provide people a space to talk with each other,” emphasizes Lee. “We really want [the donor] to know what we’re about and our members are extremely open about their experiences. This allows an openness for the donors as well.”

Grassroots members also often gain a great sense of accomplishment and satisfaction from being involved in their group’s fundraising efforts. “Many of us come to the group with personal problems,” says MUA member Silvia Lopez, who also sits on the board of directors and serves as the group’s outreach coordinator. As a peer counselor for the group, Lopez often helps members who are dealing with domestic violence or legal issues to access community resources outside of MUA.

“Fundraising helps us to keep busy, forget our problems, and help MUA at the same time,” explains Lopez. “And by raising more money, we ensure that MUA will be able to help even more women. I feel important when I can give something back to MUA.”

“To me the best part of fundraising is motivating people in the community to support MUA and seeing them respond to our request,” says MUA’s Reyes. “It makes me so happy to see that there are people who want to support MUA’s work.”

It’s clear from the work that these three groups are doing to engage their members in fundraising that it takes some time and effort, but that the end result more than makes up for it. From more income from dues and member-driven fundraising to a sense of fulfillment and reward for your members, this type of fundraising presents a win-win formula for any grassroots group. **GFJ**

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REFLECTIONS ON GIVING AND GIVERS

BY CHRIS MALCOMB

Dana (dah-nah) is a word that dates back more than 2,600 years, to the time of the Buddha. It means “generosity.” When he was alive, the Buddha offered his *dharma*, or teachings, freely, accepting only food, medicine and shelter in return. Although the Buddha felt that *dharma* was in fact “priceless,” he encouraged *dana* because he understood its impact on the giver. To this day, Buddhist teachers worldwide maintain this practice, although in the West grateful students now usually offer cash donations, while retreat centers supply the teachers’ food and accommodations.

One of my own meditation teachers described an intimate encounter with generosity when she spent a year living as a Buddhist nun in Burma. The meals, she explained, were sometimes barely palatable: a few soggy vegetables drowned in inches of oil, and a small serving of rice. Needless to say, she experienced some aversion. “I hated the food,” she said emphatically. “I hated everyone who seemed to like the food. I hated *myself* for feeling so much hatred!”

One day, as she leaned over her bowl, she noticed that a small group of villagers had entered the dining area and were watching the meal. Odd, she thought. What were they doing there? During the next meeting with her teacher, she asked for an explanation.

“Oh,” he said. “They were the family who offered the meal. They made everything and brought it to the monastery.” She’d seen names written on the chalkboard at the entrance to the dining hall, but hadn’t made the connection. “Some families spend half their yearly earnings on the meal,” her teacher continued. “It is how they support your practice. They want to witness your happiness and see you nourished. They are proud of their *dana*.”

My teacher hadn’t realized, until that moment, how deeply the thread of generosity wove through that community, both inside and outside the monastery. The robes

she wore, the tea she drank, the hut in which she slept, the meals she ate — all were given. All *dana*. The next day, when she entered the dining area, she had a new attitude about those vegetables. How could

she not embrace something that had been given with such kindness, with no expectation of anything in return?

HOW COULD SHE NOT EMBRACE
SOMETHING THAT HAD BEEN
GIVEN WITH SUCH KINDNESS, WITH NO
EXPECTATION OF ANYTHING IN RETURN?

EXPECTING A RETURN

Sometimes I get annoyed if something I’ve offered is not acknowledged. It amazes me how much time I’ve spent stewing over simple things like not getting a thank-you card, or having my name passed over in the “I’d like to thank...” speech. I guess it’s not really my fault. Our society is one where people expect returns on their investments, a place where free tote bags, tax breaks or 15 percent off all purchases are par-for-the-course. This isn’t a knock on charitable organizations or those who support them. Far from it. As we all know, those who tackle suffering and inequity head-on couldn’t exist without the gracious support of donors. There is often intense competition for those donors, and it just feels right to thank people for their kindness, regardless of the deeper motivation for their gift. Nonetheless, I can’t help wonder sometimes: What *are* those deeper motivations? Do we only give to elicit praise or make ourselves feel better? Why do so many people only think about giving when asked? Are those with minimal resources still interested in generosity? What is the true soul of giving?

The answers, of course, are complex. I'm certain that some donors simply like the gifts. (If they've already decided to support *something*, why not get a nice alarm clock or CD out of it, right?) Others may donate out of a sense of responsibility, obligation, or even guilt. Some clearly do it for the tax breaks or to have their name put on a plaque; others genuinely believe in the causes of the organizations they support. For most, it's probably a specific mixture of many factors and elements. Yet I believe that underneath anyone's external motivations, there is another, more powerful force at work. It's something that we all possess but sometimes need some help discovering.



OR MANY YEARS, I NEVER DID GOOD THINGS FOR PEOPLE... NOW I WANT TO GIVE BACK.

THE POWER OF GENEROSITY

In a recent issue of *Greater Good* magazine, Naazneen Barma chronicles a study that psychologists Deborah Small, George Loewenstein, and Paul Slovic conducted to learn some of the root triggers of altruistic behavior. The researchers gave one of two letters from an anti-hunger charity to participants. "One letter provided statistics about starvation; another featured the story of a single African girl who was suffering from starvation," writes Barma. "The psychologists then gave all the study participants the chance to donate money to the charity.... People who only read the girl's story gave more than twice as much money as people who only read the figures on starvation."



I'M SURE FEED THE HUNGRY DIDN'T TARGET INMATES IN A STATE PRISON ON THEIR LIST OF MOST LIKELY DONORS.

This study shows that "personalizing tragedy" seems the best way to elicit donations, because, as Barma notes, it "resonates with the human instinct for compassion." This instinct — to feel the suffering of another, to reach out and support, to give — is what the Buddha knew existed in every human being. It is the foundation of *dana*.

My own experience validates this view. As a volunteer writing teacher inside San Quentin State Prison, I saw *dana* emerge surprisingly in one of my students. He was a Vietnamese immigrant named Quong, a young, hard-working man who possessed a physique not uncommon to San Quentin inmates who had been there many years: a muscular torso, several scars on his face and hands, and dozens of tattoos trailing down his arms and across his neck. Of all these visible tattoos, the most prominent were a pair of fire-breathing dragons that curled down his arms: scaly bodies and sleek wings enveloping each of his enormous biceps; pale eyes glowing fiercely at his elbow; talons scraping at his smooth forearms. More than once I found myself lost in fascination about what significance the dragons captured in Quong's life.

Despite a good vocabulary and command of basic sentence structure, Quong struggled with writing and could get frustrated, sometimes erupting in fits of aggressive silence or minor outbursts. One evening, when Quong was particularly annoyed about some poor writing he had done, I deflected his irritation by asking about the dragons. He smiled, slightly surprised, and flexed his arm proudly as he ran his finger along the pigmented surface of his skin and said, "Reminder to myself."

"Of what?" I asked.

"Power," he said. "The dragon is Asian symbol of ruling the sky. Means you are free on your own. You have your own power."

The next time I went to San Quentin, Quong showed up in my classroom with a pamphlet from an organization called *Feed the Hungry*. When I walked over to shake his hand, he quietly handed it to me. On the front was a thin, frail Haitian boy: dry, dark skin; swarming flies; bloated stomach. Below was the story of his life.

"Where'd you get this?" I asked.

"Pastor in chapel handed it out," he said. "I started reading, and — " He reached out and turned the pamphlet over in my hand. He had filled out the donor information on the back page. I looked at him curiously. He shrugged and waved at the pamphlet. "I see that kid, all skinny and bones. I read his story. It gives me emotion. Like it's my kid on the street. So I sign up."

So I sign up."

"How much do you send?"

He shrugged.

"Not much. Thirty-six dollars a month. Enough for three meals a day for sixteen starving kids. Leftover money for schools, medicine and clean water."

"How much do you make?"

He grinned. "I fix sewing machines here for 65 cents an hour. But soon it will go up to 75 cents. That's \$90 a month." Despite his circumstances, he said, he felt truly blessed. "For many years, I never did good things for people. But twenty years in here has changed me. I found a higher power. Now I want to give back."

I believe we all have generous hearts. Sometimes, we just need to be given the opportunity to share them. Our culture has taught us to covet possessions, promote ourselves above others, and calculate our happiness based on what we *have* rather than what we *give*. These are powerful forces. Yet every so often I'm reminded that the instinct to protect and care for one another might be even greater. Sometimes, I realize, what suffering people — or those trying to help them — most need can come from surprising places.

I'm sure *Feed the Hungry* didn't target inmates in a state prison on their list of most likely donors. I'm sure my meditation teacher didn't expect to be fed by families who make \$300 a year. And yet, true generosity arose from just these places.

In his time, generosity was the first lesson the Buddha taught his new students. "If you knew, as I do, the power of giving," he is famously quoted, "you would not let a single meal pass without sharing some of it."

Although Quong is unlikely to have heard the word *dana*, his actions make clear that generosity is indeed a universal truth — the true soul of giving, the spark that starts the whole process.

A close friend of mine was in a horrible accident and was confined to a hospital bed for two months. "Before this happened," she told me recently, "I had no idea how many people cared about me. But I've heard from people I haven't seen in twenty years. It's overwhelming, really. All this love and generosity."

We may not all be walking around looking for people, or causes, to support. But don't doubt that it exists in all of us, just under the surface. Once given the opportunity to be released, it's going to pour out.

No matter who we are.

No matter what we've done.

No matter what we call it. **GF**

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11 Steps

TO A GREAT DONOR CULTIVATION EVENT

BY JEAN VAN'T HUL

Cultivate, cultivate, cultivate. Those three words were drummed into my head as a fundraiser and event planner, first for Boston's WGBH Public Broadcasting and later at Audubon North Carolina.

By "cultivate" I mean create a personal connection with your donors that will enhance the likelihood of a long-term relationship leading to increased giving. Special events provide a good opportunity to make a personal connection with your donors. They give you the chance to educate your donors about your organization while also allowing you to learn more about them and what makes them give. In combination with your newsletters, annual report, cultivation and solicitation letters, and e-mails, events are a key component of a long-term cultivation strategy.

Germaine Frechette, Assistant Director of Special Events for WGBH Public Broadcasting, says, "The primary goal of a cultivation strategy is to maximize lifetime value of donors by building relationships and increasing revenue through moving members up the giving ladder. It's always less expensive to keep supporters who have already made the first step to connect with your organization than it is to go out and find new ones. Events are great tools for cultivation."

The basic guidelines are the same for planning and organizing any nonprofit event, large or small. Follow these eleven steps to create a memorable donor cultivation event.

STEP 1: IDENTIFY THE DONORS YOU WOULD LIKE TO CULTIVATE

Who are the donors or prospective donors you would like to cultivate with an invitation to your event? The choices are many: general membership or mid-level

donors, new donors or long-time donors, major donors or the general public, or current low-level donors who are potential major donors.

One way to decide is to think about the need you are trying to address with this event. Leah Ferguson, who runs Chrysalis Consulting with partner Kate Pett, advises nonprofit clients to look at the bigger picture when planning an event. "Most often organizations will cite 'raising

awareness about our cause' as the desired outcome of an event. Then we have them work backwards from that. If you want to raise aware-

*An event is only an effective
cultivation tool if your donors attend.
Give them a compelling reason to come.*

ness about people living with HIV/AIDS, how is a golf tournament going to get you there? And when you're talking about raising awareness, what you are also talking about is cultivating donors. People give when they feel moved to give. An event can move people, but you have to set yourself up for that kind of success."

Consider, too, what position your organization is in: Are you a young, mostly grant-funded organization that would like to begin or expand a membership program? Then perhaps you'll want to invite the general public (and any current members) to an open house during which you educate the attendees about what you do and how they can become involved.

Are you an organization with a solid membership base but no consistent mid-level or major donor support? Then consider a series of more intimate events to help you get to know your members better and let them get to know you. Frechette says, "Use the 'show me that you know me' philosophy — meaning, don't sell me jazz if I like classical music!"

Are you seeking corporate support? Don Harris, Director of Development at MANNA FoodBank in Asheville, North Carolina, cultivates corporate support

with an annual Blue Jean Ball managed by Volunteer and Special Events Coordinator Karen Etheridge. “I’m not a big fan of special events as fundraisers because it’s not an effective use of an organization’s time and money,” says Harris. “But as a *friendraiser* it’s a whole different ball game. We use the Blue Jean Ball to encourage the involvement of corporate sponsors. They use the event as a perk

Think about how many people you ideally want to be cultivating at the event and choose a space that is appropriate for that number.

for their employees as well as for increased visibility in the community, which works out well for both of us. We have also had an acknowledgment event following the Blue Jean Ball just for the corporate sponsors where we present the Full Plate Awards. We invite the media so that the corporations get recognized publicly and get more exposure. The more exposure they have and the more connected they feel, the longer they stay connected.”

Would you like to expand your major donor base? Then consider asking a board member (or current major donor who is close to the organization) to host an event in their home for friends and acquaintances who they know have the ability to give at the major donor level. Harris describes MANNA’s concentrated major gift effort: “We’ll have small gatherings in the homes of board members and key volunteers, not necessarily as an ask, but just to get to know us. It’s a small event for four or five couples, mostly friends or acquaintances of the hosts. We’re treating our major gift effort much as you would a capital campaign, with donor rating sessions and prospect identification efforts.”

Frechette of WGBH says that it’s important to remember the social factor: “Maybe there is a peer or someone who is already related to the institution who can bring the prospective donor in. The peer is important because there is a definite social element to philanthropy.”

STEP 2: DETERMINE THE BEST WAY TO CULTIVATE THESE PARTICULAR DONORS

Ferguson of Chrysalis Consulting suggests that non-profit organizations think outside the box when it comes to events. She gives the example of a hunger-relief organization that held a high-profile art auction every year that had begun to lose its luster and its income. She says, “I suggested that they have a symbolic art auction: get the children they serve to draw pictures and make paintings, and with each piece write an ‘artist’s profile’ that shares some information about the artist (keeping the child’s name and identifying information confidential) and how the organization is serving them. People would bid on each piece and the ‘bid winner’ would get their name on a

plaque below the picture that could hang in the facility. During the event, board members would act as docents and take donors around, sharing information with them about the organization and its unique role in the community. Each donor would leave with a card-sized version of the painting they bid on with more information about the organization and how to give. This is how to expand your notion of an event. It doesn’t have to be entertaining, but it does have to be meaningful.”

Thinking through exactly why you’re having the event and how best to get your message across and cultivate your donors will help determine whether your event is a success or a failure.

An event is only an effective cultivation tool if your donors attend. Give them a compelling reason to come. Here are some ideas that might draw them in: the chance to talk one-on-one with the executive director or a local celebrity; getting the inside scoop on the latest information in your field; an invitation to a garden party at a board member’s house; being the first to hike a newly created trail; getting a tour of your organization’s facilities or a private screening and discussion of a relevant documentary. Other event attractions are the chance to help celebrate a milestone that your organization has reached or an opportunity to mingle with like-minded folks while munching on hors d’oeuvres and drinking wine.

At WGBH we held a series of events for Leadership Circle members that varied with their level of giving: we invited donors at the director level (who gave between \$500 and \$749) for an afternoon in “The Victory Garden” to meet the director and new host of a popular show; we invited producer-level members (\$750–\$999) for “Outside the Box” in-depth, roundtable conversations with station managers and decision makers. For \$100+ donors who had a strong interest in our radio programming, we invited them into the studios for simple FM Live events, during which they formed an intimate audience for a live on-air performance.

At Audubon we focused on increasing membership in the Pearson Society (donors who gave \$1,000 and up). For one event, the board chair hosted a catered dinner in his home to which we invited potential major donors and friends of the chair with an interest in Audubon. Although attendees knew they would be invited to join the Pearson Society at the event, we had a full house because the director was giving an update on Audubon’s opposition to a Navy proposal that would affect a National Wildlife Refuge and Important Bird Area, an issue that was in the news a lot at the time.

STEP 3: DETERMINE YOUR EVENT BUDGET

Take a look at what you can spend on events this fiscal year and how much of that you want to spend on any

particular event. If you have a small event budget, it may be better to spread expenses out over the year with several smaller events rather than one lavish fête.

Depending on your event, you may need to allocate money for any of the following items:

- *Food and drink* (Whether it is catered or you buy the wine and a cheese platter at the local grocery store)
- *Venue* (Will you need to rent a space, or will you hold the event in your office's conference room or at a board member's house?)
- *Flowers* (Whether you hire a florist to deliver centerpieces or pick up a bouquet at the grocery store)
- *Equipment rental* (Extra chairs, tables, easels, or audio-visual equipment)
- *Entertainment* (Will the director be speaking, or will you invite a special guest whom you may need to pay or provide travel expenses for?)
- *Graphic design* (Will your invitation and other event materials be created by a graphic designer or will they be designed on your office computer?)
- *Printing/materials* (Will your invitation and other correspondence be e-mailed? If not, will you print it on your own printer, at a copy shop, or through a professional printer? Will you need to create any signs, banners, or posters?)

If your budget is limited, think about where you need to spend money and where you can go cheap or get in-kind donations. For example, for MANNA FoodBank's annual Empty Bowls Event, a national event started by a local potter, everything is donated except the invitation. MANNA's Harris says, "We have local potters make handmade bowls and then invite members of the community to come for a simple soup and bread meal. They pay \$20 to attend, they eat out of the handmade bowls, and then they get to keep them. A lot of people in the community who are not our regular donors come back every year. Restaurants donate the food and the Doubletree Hotel donates the space and staff help. We have musical entertainment that is donated. We also have an underwriting sponsor who pays for the other event costs, so the money raised goes directly to support MANNA."

STEP 4: GET SPECIFIC

Nail down the date, time, and location. Book any special guests and venues as far in advance as possible. Create a general timeline for when everything should be done and start a list of all the steps that need to happen between now and the event. Decide on what roles staff, volunteers, and board members will play and what vendors you will need to hire (caterers, graphic designers, rental equipment, florist, etc.). Think about how many people you

ideally want to be cultivating at the event and choose a space that is appropriate for that number.

STEP 5: CREATE THE INVITATION

Whether the invitation will be an e-mail, a flyer, or a four-color, design-house card, you'll need to write and design your invitation, including all the pertinent information (date, time, location, organization, speakers or special guests, activities, food and drink, reason for event, and an RSVP date). Include your contact information (e-mail and phone number) for questions and RSVPs. Sell your donors on the event with engaging copy and design and a compelling reason to come. The invitation sets the tone for the event and for all the other materials you will create around it, including signs, posters, follow-up letters, and "take-aways." If the event is far in the future, you may want to send save-the-date postcards first.

STEP 6: INVITE THE GUESTS AND KEEP TRACK OF RSVPs

Once you send out the invitation, you will need to keep track of who is coming to the event and who their guests are. You can use a spreadsheet or database that can also generate mail merges for the invitations and all follow-up communication, event attendee lists, and name tags.

Nine Ways to Increase Your RSVP and Attendance Rate

1. Make the event and invitation interesting; have a compelling reason for donors to come.
2. Tailor the event to the donor group.
3. Choose an event date that doesn't conflict with major holidays, school vacations, competing events, or a time when your major donors have gone south for the winter (or north for the summer).
4. If inviting a small group of people, hand-address the envelopes. If inviting a large group, print the addresses on the envelopes but add a sticker saying "invitation enclosed." The invitation's not effective if they don't open the envelope.
5. Use real stamps if the mailing is small. Choose interesting stamps related to your organization if possible.
6. Tell donors that space is limited and urge them to reply soon.
7. Confirm all RSVPs promptly.
8. If you are not getting the response you had hoped for, send reminders to the donors you invited, or invite another group.
9. If the numbers allow, call or send reminder notes to the people on the RSVP list shortly before the event.

Confirm all attendees as they RSVP. If you speak with them on the phone, confirm the spelling of their names and those of their guests. If they leave a message or send an e-mail, call or e-mail back to confirm all the details so

In general, an average response rate is between 10 and 30 percent of those invited.

that they know you received their RSVP and that they are on your list for the event. Tell them that you are looking forward to seeing or meeting them at the event.

Because response rates for events can be low, invite a lot more people than you expect will attend. Response rates vary from organization to organization as well as from event to event. In general, an average response rate is between 10 and 30 percent of those invited; a really good response rate (more likely the more familiar and interactive you are with the group invited) is 50 percent. Figure on actual attendance being about 20 percent lower than your RSVP list. If the response rate to your initial invitation is lower than you'd like, consider extending the RSVP date, sending a reminder invitation to donors, and/or extending the invitation to a new and wider list of your donors.

STEP 7: COUNTDOWN

The better everything is planned and organized, the more successful your event will be and the better you will be able to deal with last-minute changes or troubleshooting that needs to be done.

Line up all the vendors you need. You may need to call around to get the best quote for your event. Arrange delivery times with your vendors and make a note of the details on your event timeline and to-do list.

Create a detailed timeline for the event day. Include vendor deliveries, set-up details and times, volunteer tasks and arrival times, and all the other details of the event.

Create all the materials you will need for the event, including event signs, parking and bathroom signs, and any handouts and "take-aways." The "take-away" can be as simple as an information sheet about your organization, or it can be a pin, a magazine that includes an article about your organization, a book, or something relevant to the theme of the event. Ferguson of Chrysalis Consulting says, "You want people to walk away with something. The Empty Bowls project is a great example of this. You leave with an empty bowl as a reminder of how many people go hungry and with a brochure detailing how you can help by supporting hunger relief efforts."

Assign staff, board, and volunteer roles. Harris of MANNA FoodBank sees special events as a way to get board members on the fundraising team. "We ask our board members to help us solicit our corporate sponsors,

especially for the Blue Jean Ball. First off, if they are in a decision making position in their own business, then we'll ask them to get their business to support us. Then, as in any fundraising campaign, we'll ask them to review the list of prospects. We'll ask, 'Who do you know and who do you feel comfortable soliciting?' We're taking advantage of our board members' relationships in the community."

Make any necessary parking arrangements. Put up signs outside the event and have a staff member or volunteer direct traffic and help with parking. If your parking area isn't sufficient, can your donors park on the street or can you arrange to use a local church or business parking lot?

Have a staff meeting to go over event timing and details. Make sure the right people have a timeline of the event so they know when to go up to the podium and address the crowd, or to dim the lights and start the film rolling, or whatever. Make sure the executive director, development director, and/or board chair also have a list of who is attending and possibly their donation level and

Sample Timeline of the Event Day

9:00 AM	Party Rentals drops off chairs, tables, and tablecloths
10:00 AM	Staff set up tables and chairs
4:00 PM	Flower Creations drops off flower arrangements
4:30 PM	Yummy Catering drops off cheese, crackers, and fruit platters
5:00 PM	Volunteers arrive and review roles with staff member
5:15 PM	Volunteers set out nametags and get ready to welcome guests
5:45 PM	Open doors, welcome first guests
6:00 PM	Event start time
6:00–6:45 PM	Donors mingle and eat
6:45–6:55 PM	Executive Director, staff member, or board member takes podium, welcomes guests, and introduces special speaker
6:55–7:15 PM	Special speaker takes podium and gives presentation
7:15–7:30 PM	Mingle
7:30–7:45 PM	As guests depart, volunteers and staff thank them for coming, collect nametags, and hand out the "take-aways"
7:45–8:15 PM	Staff and volunteers clean up

any other pertinent information, such as the donor's particular interest in your work, so they can do their schmoozing job properly.

The job of key staff members and board members is to mingle and schmooze with the donors.

Review the guest list and make sure all the guests are confirmed. If you like, you can call or send a note reminding them about the event and giving driving or parking directions, if necessary. Make nametags and a list of all the donors who will be attending.

STEP 8: SHOWTIME!

It's the day of the event. Everyone is in their place. Volunteers and staff are at the front table with an attendee list and the nametags spread out in alphabetical order. If possible, plan to open the doors 15 minutes early. Welcome each donor as they collect their nametag and check their name off on the attendee list. You will want an accurate record at the end of the event of who came and who didn't, both so you can follow up and so you can enter the information into your database.

The job of key staff members and board members is to mingle and schmooze with the donors. Remember why you're holding this event: develop the relationships that you put the event together to cultivate.

Assign a staff member or volunteer to take photos during the event. These are great for newsletters, for donor cultivation purposes, and for the office bulletin board.

STEP 9: FOLLOW UP WITH YOUR DONORS!

Send a prompt follow-up letter thanking each donor for coming to the event. Take the opportunity to tell them more about your organization and goals in the letter.

Frechette of WGBH says, "Most people don't expect event follow up, so you have an opportunity to stand out among other organizations. Perhaps you have an attractive photo of the donor at the event — this is always a great reason to write and say, 'Thanks for attending, great to meet you and here's a nice memory.' Or there's an article in the paper that is pertinent to the event subject and can be mailed to all those who attend with a meaningful cover letter restating the value of their support. Or you have a list of additional event offerings that may be of interest."

Following up after the event is one of the most important steps of the entire process. Take every opportunity to communicate and connect with your donors and prospective donors. Special events cost more money than most

other cultivation efforts and are the least likely to show immediate results. One of the keys to ensuring that the money was well spent is to follow up with your donors after each event.

Even no-shows should be seen as an opportunity for sending follow-up letters. Tell them you're sorry they weren't able to make it, give them a quick event recap,

include the materials you handed out, and say that you hope they can make it to the next event.

STEP 10: FOLLOW UP INTERNALLY

Send thank you notes to your volunteers, board members, and special guests — anyone who helped make the event successful. Show appreciation and they will want to help you again with your next event.

Enter event attendance in your donor cultivation database to track the effectiveness of your events as part of your overall cultivation strategy and also to help track donor interests (did they come to the policy event but not the garden party?).

STEP 11: REVIEW THE EVENT

Have a staff meeting to discuss the event while it's still fresh in everyone's mind. Talk about what worked and what didn't. What would you do differently next time? Write down event successes or failures immediately for future reference. Solicit feedback from your volunteers

Following up after the event is one of the most important steps of the entire process.

and other people involved with the event as well — they are likely to have different viewpoints.

Thank everyone for their hard work and give yourselves a pat on the back for a successful event! And remember that, like anything else, the more you do events, the better you'll get at them.

If you follow these eleven steps, you will be well on your way to hosting a successful event while cultivating your donors and helping to ensure the lasting financial stability of your organization. As Frechette of WGBH says, "Meaningful events keep the conversation going between the organization and its supporters. Like any relationship, the more you engage with someone, the more you learn about what motivates them into action." **GF**

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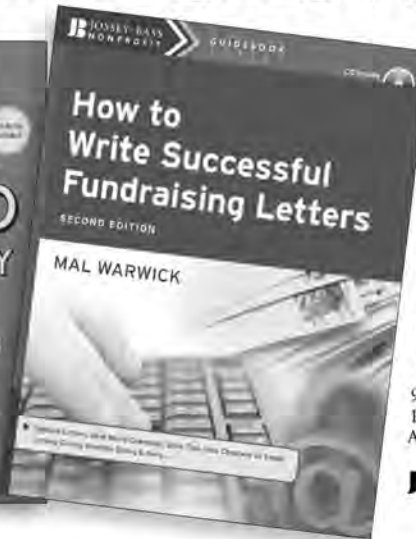
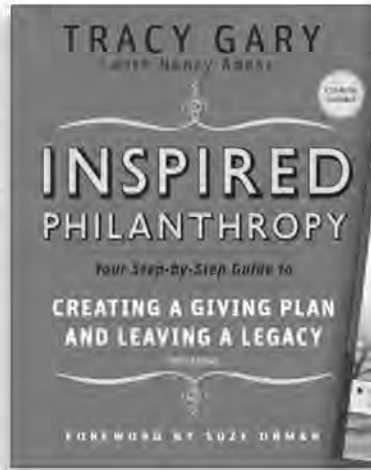
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